choose and book

NHS

End User Manual for Web-Based Referring Practice Administrators for Choose and Book R2.2

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Choose and Book Programme

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Welcome to the End User Manual for Web-Based Referring Practice Administrators for Choose and Book R2.2

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2 Background to Choose and Book

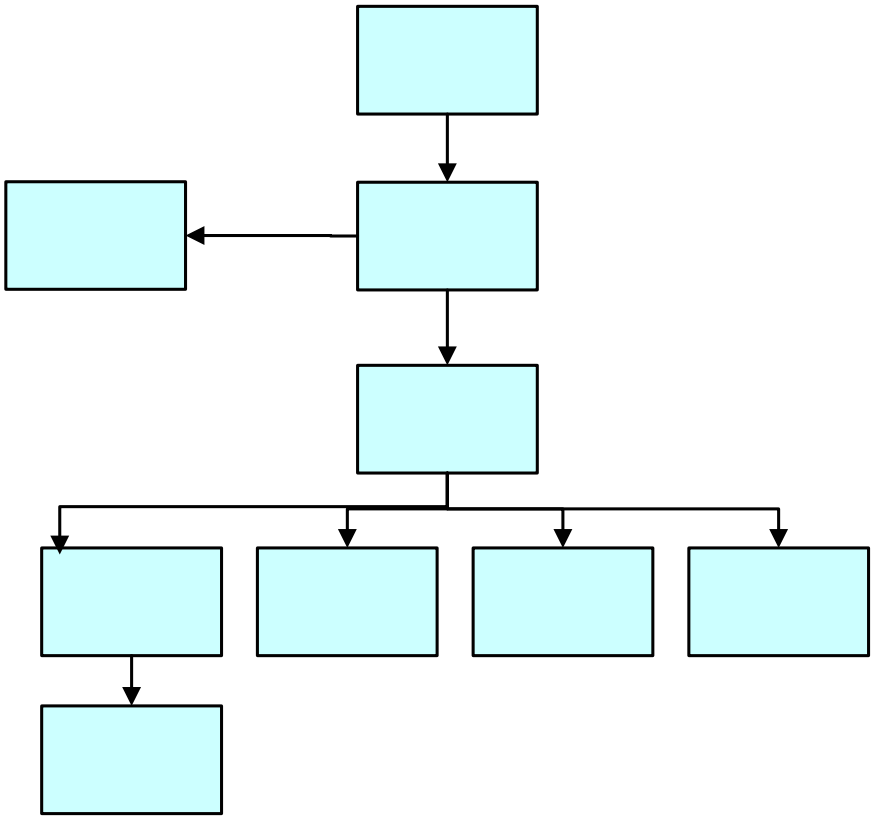
Choose and Book is the nationally commissioned system built by Atos Origin to provide the NHS with an electronic booking and choice tool. Choose and Book first went live in 2004, and is now at release version 2.2 (R2.2), which went live at the end of September 2005.

Choose and Book enables a patient to choose where they wish to attend for an outpatient appointment from those commissioned by their Primary Care Trust (PCT), and make a booking of a date and time of their choice, from those available.

This end user manual sets out the functions that a Practice Administrator can perform in Choose and Book, accessing it via the NHSnet (or web) and not via their local GP system.

Choose and Book enables a referrer to refer or book a patient to a service commissioned by their PCT, and to send an electronic referral letter with that referral or booking

The functions that a Practice Administrator can do in Choose and Book when completing a referral and booking are:



3 Accessing Choose and Book with your Smartcard

3.1. Using your Smartcard

⇒ A Smartcard looks much like a credit card, with a picture of the user, together with their Unique Identification number (UID) and a gold chip where all the information is held.

⇒ To access Choose and Book, you should already be logged on to your computer, so you see your desktop on your screen

⇒ Put your smartcard into the smartcard reader

⇒ The Gem Authenticate box appears

⇒ Type in your PIN number (also called passcode) and click on OK or press return on the keyboard

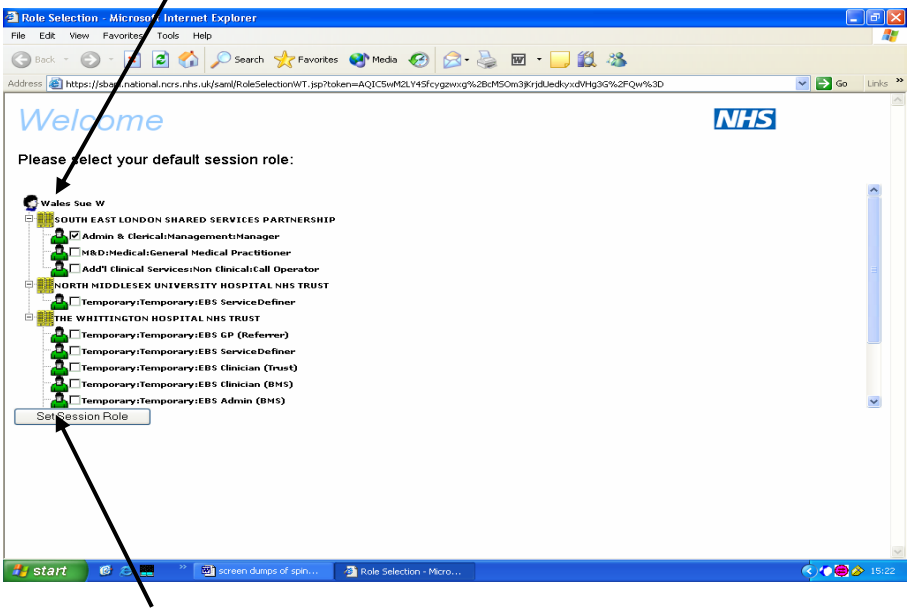
⇒ You may (or may not, depending on local set-up) now see a security alert.

Security Alert
Information you exchange with this site cannot be viewed or changed by others. However, there is a problem with the site's security certificate.
The security certificate was issued by a company you have not chosen to trust. View the certificate to determine whether you want to trust the certifying authority.
The security certificate date is valid.
The security certificate has a valid name matching the name of the page you are trying to view.
Do you want to proceed?
Yes
No
View Certificate

⇒ Click Yes to proceed

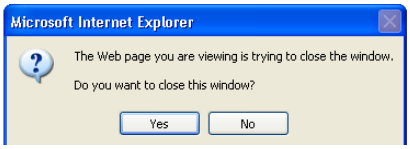
⇒ You then see a screen saying **Welcome** with the role(s) you have been allocated on the Spine.

⇒ Click in the box next to the role you wish to be, for this session, so there is a tick in the box next to that role.



⇒ Click on Set Session Role

⇒ Now the system asks if you want to close the present window. Click on Yes


Microsoft Internet Explorer
The Web page you are viewing is trying to close the window.
Do you want to close this window?
Yes
No

⇒ You are now returned to your desktop, having successfully logged on to the Spine.

3.2. If you have a Choose and Book icon on your desktop:

⇒ Double-click on the Choose and Book icon on the desktop to launch Choose and Book

⇒ Choose and Book sometimes takes a little while to check your authentication, and then, if you have just one Choose and Book Business Function, the Home Page will open; if you have more than one Business Function you will go to the Role Selection screen.

⇒ You have now accessed Choose and Book using your smartcard

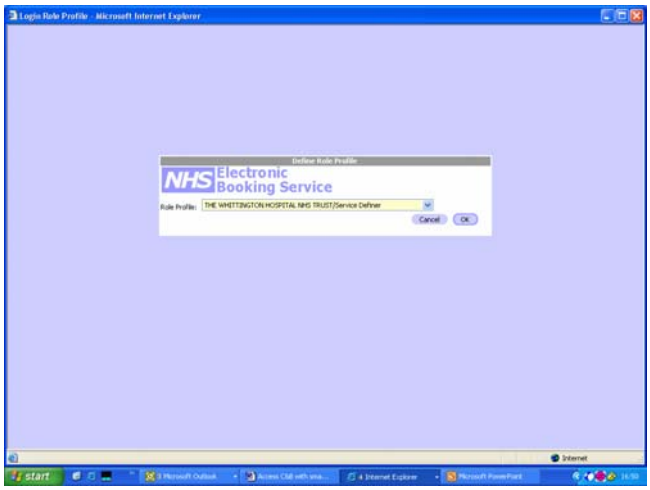
3.3. If you do NOT have a Choose and Book icon on your desktop:

⇒ Open Internet Explorer on your computer by clicking on the Internet icon

⇒ In the address box of the internet screen, type in **https://nww.ebs.ncrs.nhs.uk/app-ebs**

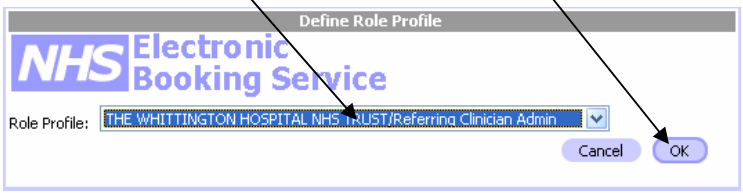
NB: Your Smartcard must remain in the smartcard reader for the whole time that you are using the system. If you pull your Smartcard out of the reader, your session will end.

3.4. Selecting your Business Function in Choose and Book



⇒ As a Practice Administrator, within Choose and Book, you will have been given the role of "**Referring Clinician Admin**"

⇒ Select your role from the pick list and click OK



⇒ Choose and Book will now load your Home Page

3.5. Logging out of and Closing Choose and Book

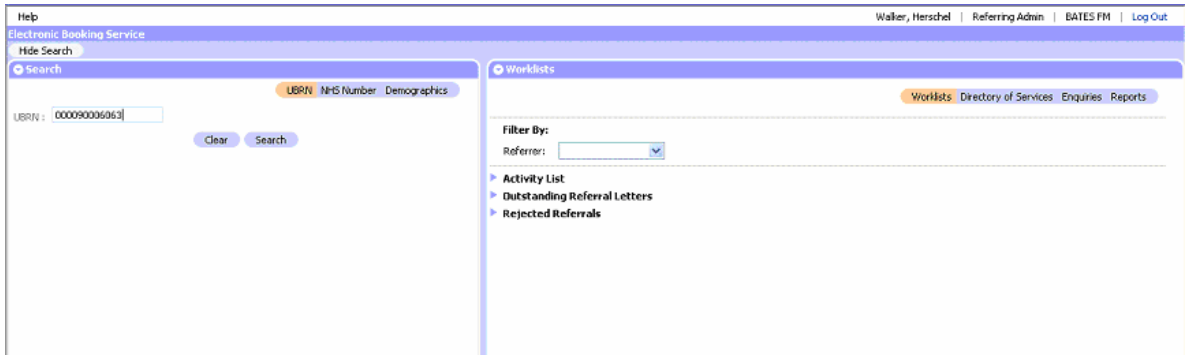
⇒ To log out of Choose and Book you click on Log Out near the top right of the screen

⇒ This takes you back to the selecting role screen, so if required, you can select another Choose and Book role, and go back in to the tool from here.

⇒ To exit Choose and Book completely, you need to click on the ✕ at the top right corner of the screen.

3.6. Your Home Page

⇒ Your homepage has 2 main sections: **Search** (on the left) and **Worklists** (on the right).



⇒ The **Search** section is where you can search for your patient from the Patient Demographic Service (PDS) on the Spine.

⇒ The **Worklists** section gives you the latest information on the patients your practice has initiated or completed bookings for, and is a useful tool for you to check if your practice staff or GPs have any outstanding actions.

4 Completing the Booking of an Appointment

⇒ Your GP will already have initiated the booking by shortlisting the clinically appropriate service(s) for the patient to choose from. This is termed an '**Appointment Request**'.

⇒ When the patient comes to the practice reception, or to practice admin staff, to book the date and time at the hospital of their choice they should give you their Appointment Request printout, with their UBRN on it, so you can search for them using their UBRN.

4.1. Selecting a Patient

⇒ From your Choose and Book Home Page

⇒ Click on UBRN and enter the UBRN number in the box (do not enter the hyphens)

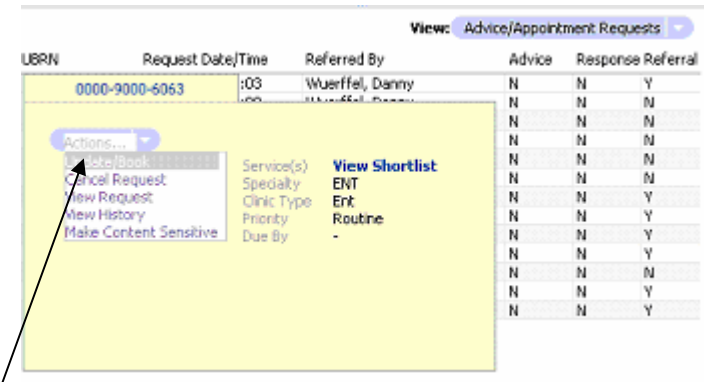
⇒ Click Search

NB: The UBRN is a number generated by Choose and Book for your patient's particular appointment request.

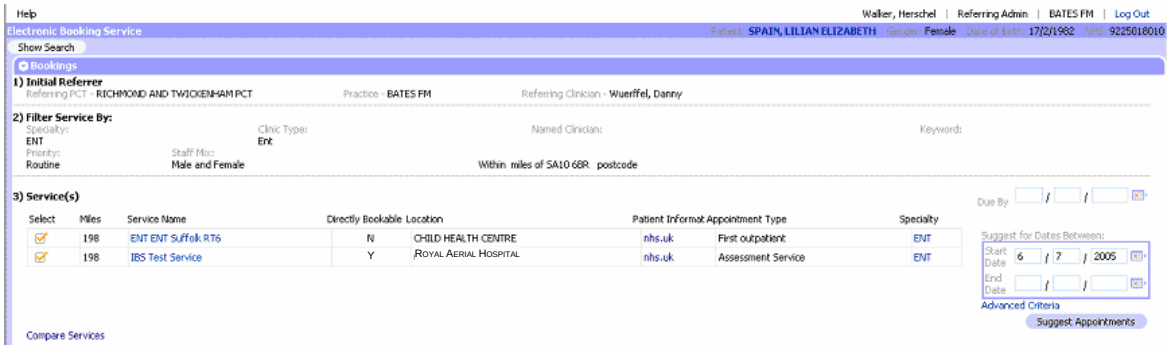
⇒ Once your patient's details are loaded you will see their NHS number in blue and their name.

⇒ Change the **View** by clicking on the **View** picklist and select **Advice/Appointment Requests**

⇒ Click on the blue **UBRN Number,** that matches the one on their printed appointment request, from the column on the left



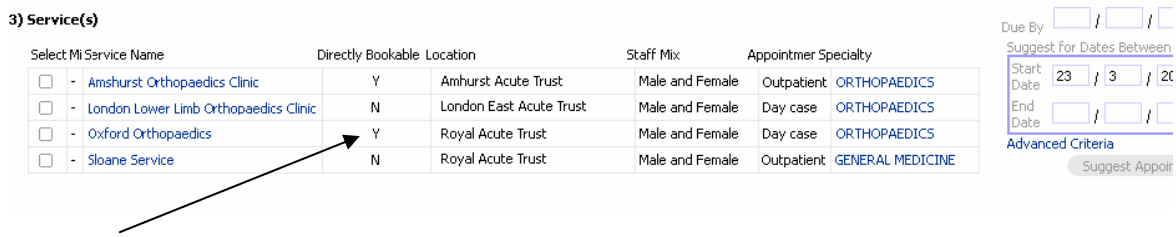
⇒ Click on Actions and select **Update/Book**



⇒ You now see the Booking Screen where you can see the shortlisted services for the patient to choose from.

4.2. Directly and Indirectly Bookable Services

⇒ The columns of shortlisted services show the **Service Name**, **Directly Bookable** and **Location**, plus other columns.



A **Y** in the Directly Bookable column means that a service is **Directly Bookable** (i.e. you can book your patient for an appointment in the service provider's PAS electronically using Choose and Book).

An **N** in the Directly Bookable column means that a service is an **Indirectly Bookable Service (IBS)** (i.e. you cannot directly book your patient in for an appointment in that service provider's PAS electronically, as the patient will need to call the IBS call centre.

The telephone number of the IBS services listed will be on the patient's Appointment Request Summary printout.

4.3. Completing a Booking for Directly Bookable Services

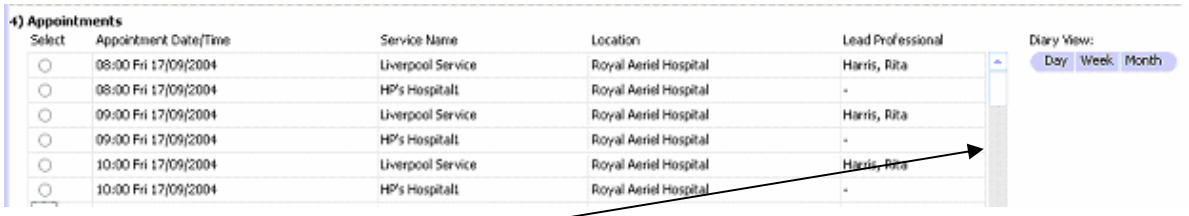
⇒ Remember that you can only book appointments in services that are Directly Bookable via Choose and Book; the patient needs to call the IBS service's telephone numbers to complete their bookings with them.

⇒ Before asking Choose and Book to find available appointments for the Directly Bookable service(s) your GP has selected, you can limit the search by filling in the date range of when your patient should or wishes to be seen.

⇒ The **Due By** date is the latest date by when you want your patient to be seen at the hospital.

⇒ The **Start Date** (defaulted to the current date) and **End Date** are the dates within which you want to view available appointment slots for your patient to be seen at the hospital.

⇒ Click on Suggest Appointments and Choose and Book will display in chronological order all the appointment slots for all your selected services within the date ranges you have specified.


4) Appointments
Select
Appointment Date/Time
Service Name
Location
Lead Professional
Diary View:
Day Week Month
08:00 Fri 17/09/2004 Liverpool Service Royal Aeriel Hospital Harris, Rita
08:00 Fri 17/09/2004 HP's Hospitalt Royal Aeriel Hospital -
09:00 Fri 17/09/2004 Liverpool Service Royal Aeriel Hospital Harris, Rita
09:00 Fri 17/09/2004 HP's Hospitalt Royal Aeriel Hospital -
10:00 Fri 17/09/2004 Liverpool Service Royal Aeriel Hospital Harris, Rita
10:00 Fri 17/09/2004 HP's Hospitalt Royal Aeriel Hospital -

⇒ You can use the scroll bar to see up to 50 appointments currently available. (You can click the Next button to see the next 50, and Back to see the previous 50)

⇒ You can change the view by clicking on Week or Month

⇒ Select one appointment of the patient's choice by clicking on the round radio button to the left of the chosen date and time

⇒ Click Book (NB: Don't click Request at this point as this will not book the appointment in the selected slot, it will just create an Appointment Request)

⇒ Review the appointment details

⇒ If the booking details are not correct, click Don't Submit to go back to the previous screen

⇒ To print off the Appointment Summary and your patient's password click Print. You then have the option to print just the Appointment Summary, or the Appointment Summary and the Patient Password. Click on the option you wish. The Appointment Summary printout includes the telephone number of the CABAL, where the patient can change their appointment.

⇒ Click Print and then select the printer you want to print to

⇒ Click OK

⇒ Click Close to close the Print Appointment Confirmation screen

⇒ Click Close to close the Appointment Summary screen

⇒ You have now made a booking for your patient and printed off for them a summary of their appointment made.

NB: Tell the patient that the hospital will send the patient a clinic letter to confirm their appointment and give them more details about how to get to the room where the clinic is being held, as the hospital still needs to accept the referral and booking.

5 Completing the Appointment Request for an Indirectly Bookable Service (IBS)

Your GP will already have initiated the appointment by shortlisting the clinically appropriate service(s) for the patient to choose from. This is termed an '**Appointment Request**'.

When the patient comes to the practice reception or to practice admin staff to complete their choice and book the date and time for an appointment, they should give you a printout of their Appointment Request with their UBRN on it so you can search for them using their UBRN.

The Appointment Request will contain all the shortlisted clinically appropriate services from the GP.

5.1. Completing the Appointment Request for an IBS

⇒ If your patient chooses a service that is an IBS, this means that the booking of an appointment cannot be made electronically via Choose and Book, i.e. it is an Indirect Booking (IBS).

⇒ To complete the booking of an appointment with an IBS, the patient or their carer/advocate will need to telephone the IBS call centre (the number will be on the patient's Appointment Request printout) where a Booking Manager at the providing service will be able to complete the booking with the patient (or their carer/advocate) over the telephone.

⇒ The caller does not need to use the Choose and Book application to make the IBS telephone call and complete the booking of time and date with them.

6 Sending an Electronic Referral Letter on behalf of your GP

NB: to send a referral letter in Choose and Book an appointment request must have been completed, but a booking of date and time need not have been completed.

NB: the GP should write the referral letter or they may have dictated the referral letter for the Practice Administrator to enter on their behalf

6.1. Creating a Referral Letter

Before you can send a referral letter in Choose and Book, you must first create the referral letter on your computer and save it, so you can attach it in Choose and Book.

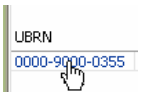
Check with your GP System Supplier for how you should save your electronic referral letters in your GP system, or decide where you will save any MS Word letters you have written.

6.2. Getting to the Referral Letter Section

⇒ There are several ways that you can get to the Referral Letter section of Choose and Book:

- Directly from the appointment summary or booking summary screen by clicking on Add Referral Letter
- Or from the worklist **Outstanding Referral Letters**
- Or by searching for and finding your patient and viewing their appointment history (see below)

⇒ Click the UBRN of your patient for the appointment or appointment request already made.

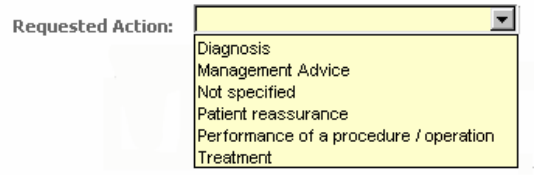


⇒ Click Actions and select **Add Referral Letter**

⇒ You are now in the Referral Letter screen.

6.3. Sending a Referral Letter

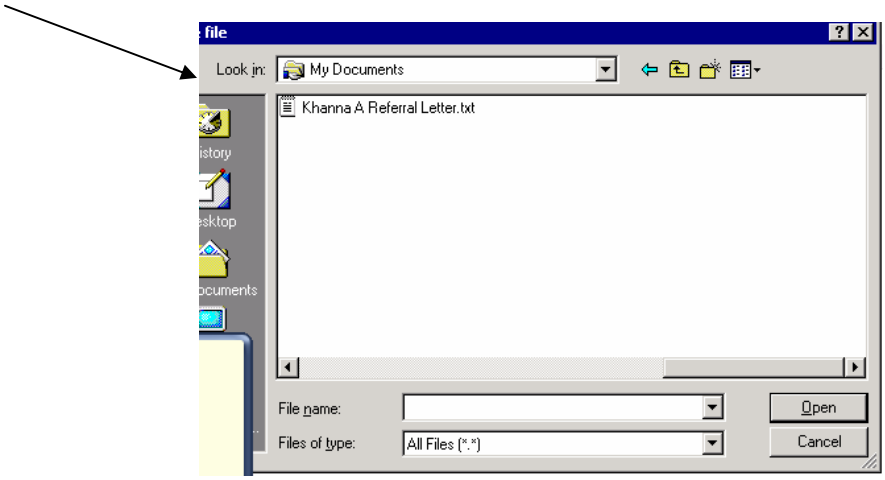
⇒ From the **Requested Action** pick list, select the action your GP would like the consultant to whom you are referring, to take



⇒ Click Attachments. You now see a box where you will need to browse for and select your referral letter as an attachment

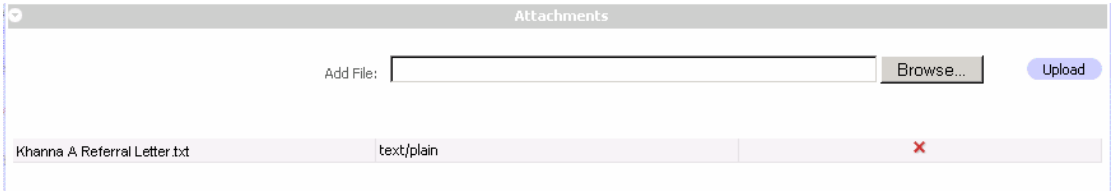
⇒ Click Browse... to search for the file on your computer

⇒ Pick the correct directory and folder where your referral letter is saved in the **Look in** box



⇒ Click on the desired file to highlight it and click Open

⇒ Choose and Book shows you the file you have selected. Click Upload to add the file to the **Attachments** list. You can add more files at this stage if you wish to have more than one attachment sent as the referral



⇒ Click Submit to add the file(s) to the referral letter

⇒ Click Submit to save the referral letter attachments in Choose and Book ready for the Hospital Consultant to review

⇒ Click Close to close the Referral Letter Summary screen

7 Reviewing your Worklists

⇒ When using Choose and Book you can review the progress of patients from your practice in the booking process by reviewing your worklists.

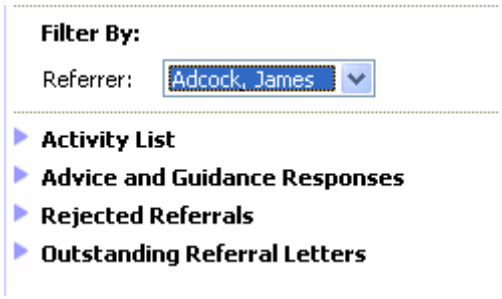
⇒ There are 4 worklists for a Practice Administrator:

- Activity List
- Advice and Guidance Responses
- Rejected Referrals
- Outstanding Referral Letters

⇒ From the Choose and Book Home Page click on

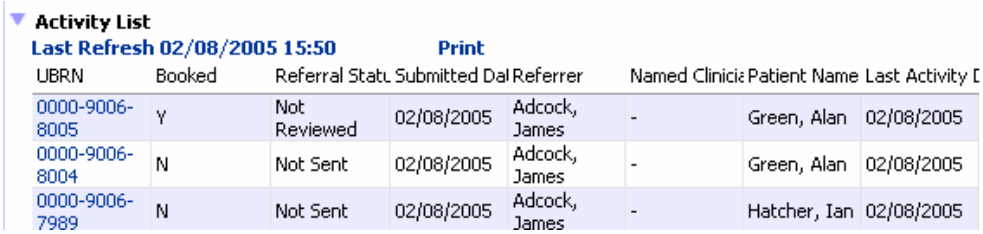
⇒ Select the Referrer whose worklist you wish to view from the **Referrer** pick list

⇒ To open one of the worklists, click on the blue triangle next to the worklist you wish to view, or click on the word (e.g. Activity List)



7.1. Activity List

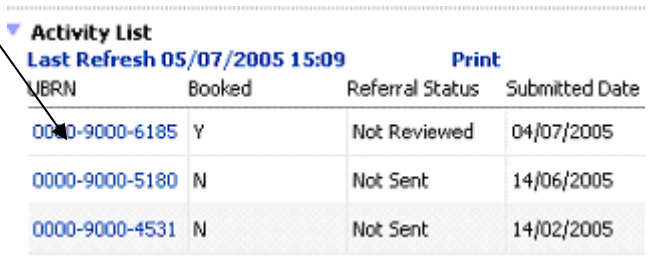
You can see for those patients referred and/or booked by your practice, where they are in the system.



UBRN	The patient's unique booking reference number
Booked (Y/N)	This tells you if your patient has or has not booked their appointment yet
Referral Status	The status of the referral including the advice and guidance status
Submitted Date	Date the appointment request was submitted
Referrer	The name of the referrer

Named Clinician	Name of the Clinician to whom the patient is being referred
Patient Name	The name of the patient with that UBRN
Last Activity Date	When the last activity was completed on this UBRN by any user

⇒ Click on the Unique Booking Reference Number (**UBRN**) of the patient you wish to review.



⇒ Click on Actions and select the task you want to perform (e.g. view history or cancel an appointment etc)

⇒ Proceed with the action you have selected

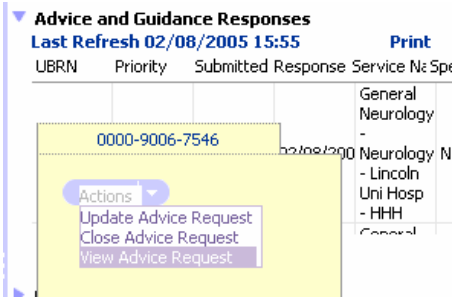
7.2. Advice and Guidance Responses

You can see the responses for any requests for advice and guidance that you have requested from a hospital clinician team.

UBRN	The patient's unique booking reference number
Priority	Tells you the priority with which your request was sent
Submitted Date	Date the appointment request was submitted
Response Date	The date that the A&G request was responded to by the hospital clinician
Referrer	The name of the referring clinician who sent the advice request
Service Name	The name of the service that the advice request was sent to

Specialty	The name of the specialty
Clinic Type	The name of the clinic type
Patient Name	The name of the patient for whom the advice request was sent

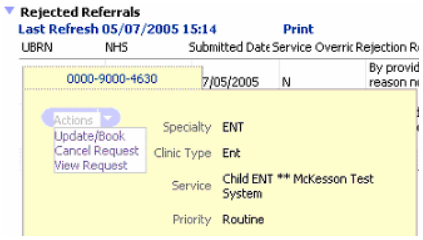
⇒ Click on the Unique Booking Reference Number (UBRN) of the patient you wish to review the response for and click **actions**, then **view advice request**.



⇒ You can then print off the advice and guidance response for your GP

7.3. Rejected Referrals

⇒ You can see any referrals that have been rejected by the hospital for any of your practice's patients

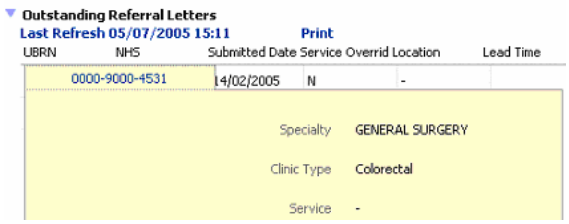


UBRN	The unique booking reference number of the patient whose referral was rejected
NHS	NHS number of the patient whose referral was rejected
Submitted Date	The date the referral was submitted
Service Override	Was the service selection booking guidance recommendation overridden by the referrer for that referral?
Rejection Reason	Reason selected by Provider Clinician for rejection
Location	The location of the service for the referral
Referrer	Name of the referrer
Patient name	Name of the patient referred

NB: Any patients in this list will need to be contacted by your practice to inform them that their booking is now cancelled, and they will need to have a new appointment request to a new or alternative service selected by the GP.

7.4. Outstanding Referral Letters

⇒ You can see if there are any patients that have bookings, for whom your GP has not written/sent a referral letter.



UBRN	The unique booking reference number of the patient whose referral was rejected
NHS	NHS number of the patient whose referral was rejected
Submitted Date	The date the referral was submitted
Service Override	Was the service selection booking guidance recommendation overridden by the referrer for that referral?
Location	The location of the service for the referral
Referrer	Name of the referrer
Lead Time	The closing date by when you need to have sent a referral letter
Patient name	Name of the patient referred

NB: Until a referral letter is sent, the hospital will have no information to review about your patient.

⇒ Only a Referring Clinician Admin or Referring Clinician may send a referral letter.

8 Changing or Rebooking an Appointment

NB: Remember that to be able to cancel or change a booking, the appointment must have already been booked as a directly bookable appointment (any IBS appointments must be cancelled with the IBS call centre).

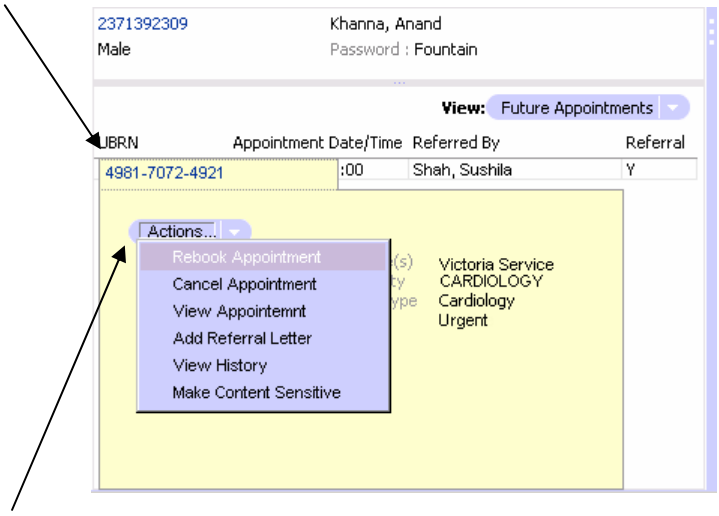
You first need to find your patient and their current appointment booking.

On your Homepage, there are two ways to find the patient and the appointment booking you wish to cancel or change:

- Either **Search** for the patient by their UBRN, NHS Number or demographics
- Or click on **Activity** in the Worklist section

8.1. How to Change an Appointment Booking for a Directly Bookable Services

⇒ Click the patient's **UBRN** for the appointment that you wish to change. You will be effectively cancelling the appointment already made, and rebooking for a new appointment in Choose and Book.



⇒ Click Actions and select **Rebook Appointment**. Rebook effectively means you are cancelling the old booking and rebooking a new appointment

⇒ You now see the services that the patient can rebook in to on the main booking screen. This reveals only those services that you have previously selected when you initiated the original appointment request or booking. Click Suggest Appointments

⇒ You now see the appointment slots for you to choose from with the patient. Continue to make the new booking as in section 4.

⇒ Choose and Book will cancel the old appointment booking automatically when you make the new booking.

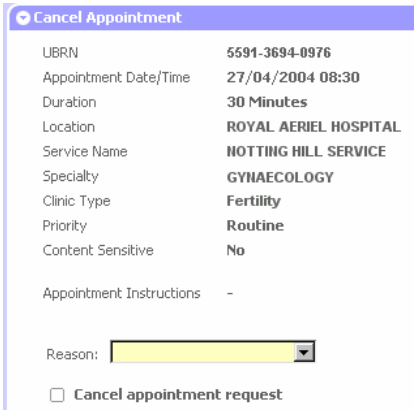
8.2. How to Cancel an Appointment Booking for Directly Bookable Services

NB: The GP in the surgery can only cancel an appointment for a Directly Bookable Service, as IBS services cannot be cancelled electronically via Choose and Book. If you want to cancel an IBS-booked appointment, you will need to contact the IBS service to ensure that that appointment is cancelled in the IBS's Hospital PAS.

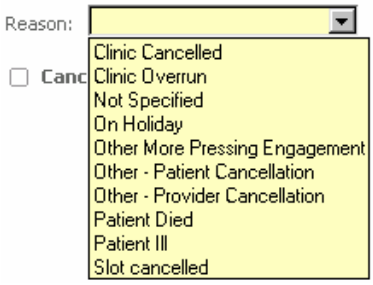
⇒ Click the patient's **UBRN** for the appointment that you wish to cancel

⇒ Click Actions and select **Cancel Appointment**

⇒ Choose and Book shows you the Cancel Appointment screen, which displays the details of the appointment already made.



⇒ Select a **Reason** for you cancelling the appointment from the picklist (NB: this is a mandatory yellow field.)



⇒ You can either cancel just this appointment so that you or the patient can make a new appointment later, you can also cancel the appointment request at this stage if you want to cancel the whole referral.

⇒ If you wish to cancel both the appointment booking and the Appointment Request, click on the box next to **Cancel Appointment Request** to put a tick in the box

⇒ If you wish to just cancel the appointment booking, **do not** put a tick in the box

⇒ Click Cancel Appointment

⇒ Choose and Book gives you a warning message to confirm the action you are about to take. Click Yes

9 Updating Patient Details

Patient Details are held on the Patient Demographic Service (PDS) on the Spine. It is good practice for a GP to check their patient's details held on the PDS each time you use Choose and Book, and, if required, update the details with the patient.

9.1. Accessing the Update Patient Details Section

⇒ In Choose and Book, you can update specific demographic information about a patient and add a patient password.

⇒ You can access this section in 3 ways:

1. Click

, then click

2. Search for and select your patient from the Spine (see section 4)
    - Search for patient
    - Click on the NHS number
    - Click

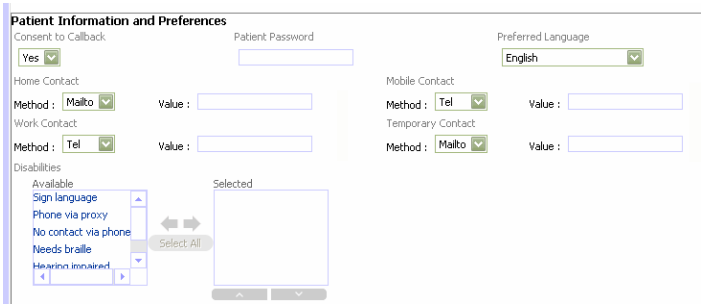
    - Select **Update Person**
3. or Click on **Update Person Details** when processing an appointment request or booking

9.2. Updating Patient Details

⇒ You are presented with the **Patient Information and Preferences** screen.

⇒ Check the patient's details (names, date of birth, GP details, and telephone contacts) with the patient.

⇒ Add or change the patient information and preferences as needed. You can insert or change the consent to call back, patient password, preferred language, home contact, mobile contact, work contact, temporary contact and disabilities.



⇒ Click Submit and the PDS will be updated

10 Reviewing Reports and Enquiries

10.1. Reports

There are reports available to a Practice Administrator that uses data collected as patients are booked using Choose and Book. Reports are pre-defined sets of information for a pre-set period of time. The pre-set period of time for reports is a calendar month and they are generated retrospectively.

⇒ From the Choose and Book Home Page click Reports on your Home Page, and then select the report you wish to view.

⇒ Click on Print to print off the report you are viewing.

⇒ Click on Close to return to your Home Page.

10.2. Enquiries

Choose and Book runs enquiries to give you more information. An Enquiry is similar to a report with pre-defined information. You can define your own 28 day time period for an enquiry

⇒ From the Choose and Book Home Page click on Enquiries and select the type of enquiry you wish to view.

⇒ You can print off your enquiry by clicking on Print

⇒ These enquiries are very useful for your practice, as you can run these enquiries to see which patients have had their appointments cancelled, or where a patient has DNA'd (did not attend) or if a patient has not completed their booking with the call centre within the expected time, and print them off for your GP, so they can decide on the appropriate action to take.

⇒ Your GPs have access to similar enquiries from their own screens in Choose and Book, but you can assist them to take appropriate actions when required with this information.

⇒ Click on Close to return to your Home Page